



State of Wisconsin Department of Administration

Task Administration Job Aid

Version 1.1

Version History

Version	Date	Editor	Description
1.0	4/20/16	HCM Team	Initial release
1.1	10/1/19	Matt Olsen	Fluid update and combine related job aids

Role: Agency Task Configuration Specialist

CREATE A TASK PROFILE

1. Navigate to Task Profile page
 - a. **Navigation:** Workforce Administrator Homepage > Position & Task Maintenance Dashboard > Task Reporting Setup Folder > Task Profile
 - b. Select the Add a New Value tab
 - c. Assign a Task Profile ID that describes the Task Profile and click Add

The screenshot shows the 'Task Profile' form with the 'Add a New Value' tab selected. The 'Task Profile ID' field contains the text 'TESTTASK'. The 'Add' button is highlighted in green.

2. Complete the Task Profile Information fields
3. Click the Plus Sign (+) to the right of the allocation row to add multiple allocations
4. Complete all applicable fields for the Task Profile in the Allocation Detail section by clicking on HR and TL Elements and ChartFields tab

The screenshot shows the 'Task Profile' form with the 'Task Profile ID' set to 'TESTTASK'. The 'Task Profile Information' section includes fields for 'Effective Date' (09/01/2019), 'Status' (Active), 'Description' (For Testing Purposes), 'Task Template ID' (WIS_TASK01), and 'Allocation Type' (Allocation by Percentage). The 'Allocation Detail' section shows two rows with allocation percentages of 75.000000 and 25.000000, with plus and minus buttons for each row.

WARNING: Once the Task Template ID is selected and saved, you will not be able to change it. If it needs to be changed, you must inactivate the Task Profile and create a new one.

5. Click Save

CREATE A TASKGROUP

1. Navigate to Taskgroup page
 - a. **Navigation:** Workforce Administrator Homepage > Position & Task Maintenance Dashboard > Task Reporting Setup Folder > Task Profile
 - b. Select the Add a New Value tab
 - c. Assign a Taskgroup ID that describes the Taskgroup and click Add

Taskgroup

Find an Existing Value **Add a New Value**

Taskgroup TESTGROUP

Add

2. Complete the Taskgroup Information fields
3. Complete the Time Reporting Templates section by selecting both an Elapsed and Punch time reporting template

Taskgroup Information

*Effective Date 09/01/2019

*Description For Testing Purposes

*Task Template ID WIS_TASK02 WIS_TASK02

*Status Active

Short Description For Testin

Default Task Profile

Time Reporting Templates

*Elapsed WIS_ELAPS4 Elapsed Task Template Required

*Punch WIS_PUNCH5 Punch Task Template Required

4. Assign the Task Profiles to the Taskgroup and designate one Task Profile as the Default Task Profile. Click the Plus Sign (+) to add multiple Task Profiles

Valid Task Profiles

*Task Profile ID	Description	Status	Default		
TESTTASK	For Testing Purposes	Active	<input checked="" type="checkbox"/>	+	-

WARNING: Once the Task Template ID is selected and saved, you will not be able to change it. If it needs to be changed, you must inactivate the Task Profile and create a new one.

5. Click Save

ATTACH A TASKGROUP

1. Navigate to Maintain Time Reporter Data page
 - a. **Navigation:** Workforce Administrator Homepage > Payroll Dashboard > Time & Labor Tile > Time Reporters Folder > Maintain Time Reporter Data
 - b. Enter at least one search criteria and click Search
2. Click the Plus Sign (+) in the Time Reporter Data section to add a new row

The screenshot shows a software interface for managing time reporter data. At the top, there are navigation links: 'Organizational Relationship Employee', 'ID', 'Badge Detail', and 'Employment Record 0'. Below this is a search bar and a 'View All' link. The main area contains a form with fields for '*Effective Date' (09/04/2016) and '*Status' (Active). A red box highlights a plus sign (+) button next to the status field.

REMINDER: Time Reporter Data must always be effective dated as of the first Sunday of a pay period to ensure employee's timesheet is able to process payable time correctly.

3. Change the Effective Date to correspond with the first Sunday of the pay period it is taking effect
4. Verify that the Elapsed or Punch Time Template on Time Reporter Data matches the Elapsed or Punch Time Template selected in the Taskgroup. If they do not match, update the appropriate Time Template to match

5. Enter or select the new Taskgroup

Time Reporter Data 1 of 2 | View All

*Effective Date	09/01/2019			*Status	Active			
*Time Reporter Type	Punch Time Reporter							
Elapsed Time Template	<input type="text"/>							
Punch Time Template	WIS_PUNCH1			Punch Time Basic				
Time Period ID	PSDAY			Day Time Period - PS Delivered				
*Workgroup	WISPONEX			Positive Non Exempt Time Repor				
*Taskgroup	TEST			TEST				
Task Profile ID	<input type="text"/>							
TCD Group	<input type="text"/>							
Restriction Profile ID	<input type="text"/>							
Rule Element 1	CASH			Cash Pay Out for Overtime				
Rule Element 2	<input type="text"/>							
Rule Element 3	<input type="text"/>							
Rule Element 4	CASH			Cash Pay Out for Overtime Holi				
Rule Element 5	<input type="text"/>							
Time Zone	CST			Central Time (US)				

Payroll

Send Time to Payroll

Commitment Accounting

For Taskgroup

For Department

6. Click Save